



REPLY TO  
ATTENTION OF

**DEPARTMENT OF THE ARMY**  
U.S. ARMY MEDICAL COMMAND  
HEALTH CARE ACQUISITION ACTIVITY  
2107 17TH STREET, SUITE 69  
FORT SAM HOUSTON, TEXAS 78234-5069

MCAA  
2002

1 July

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Guidance on PD2 Desktop Management, Operating  
Instruction 02-04

1. PURPOSE. To provide guidance on the standardization  
of routine procedures and desktop management within PD2.

2. STANDARD NAMING AND NUMBERING CONVENTIONS.

a. Vendor and Organization Addresses:

(1) Vendors and Organizations will input in  
accordance with user guide titled "Vendor Entry."

(2) PD2 allows multiple addresses for a single  
organization/vendor. Therefore, organizations'/vendors'  
existing addresses must be searched prior to entry of a  
new address. If the new address is needed, enter only  
the address; do not reenter the organization name.

(3) Users will consult Central Contractor  
Registration (CCR) and SBA Pro Net prior to adding new  
vendors and/or vendor addresses.

b. Purchase Requests (PR). Purchase requests will  
be input and assigned IAW user guide titled "PR Entry and  
Workload Assignment."

c. Solicitation and Award PINN. IAW DFARS 204.7003  
(3), use the following alpha characters in position 9 of  
the PIIN.

A - Blanket purchase agreements.

B - Invitations for bids.

C - Contracts of all types except indefinite  
delivery contracts, facilities contracts, sales  
contracts, and contracts placed with or through other  
government departments or agencies or against contracts  
placed by such departments or agencies outside the DOD.

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D - Indefinite delivery contracts.

F - Contracting actions placed with or through other government departments or agencies or against contracts placed by such departments or agencies outside the DOD (including actions with the National Industries for the Blind (NIB), the National Industries for the Severely Handicapped (NISH), and the Federal Prison Industries (UNICOR)).

G - Basic Ordering Agreements.

H - Agreements, including basic agreements and loan agreements, but excluding basic purchasing agreements, basic ordering agreements, and leases.

L - Lease agreement.

P - Purchase Orders -- automated (assign V only when numbering capacity of P is exhausted).

R - Request for Proposal.

T - Request for Quotation -- automated (assign U only when numbering capacity of T is exhausted).

d. Manual awards and solicitations issued OUTSIDE PD2.

The following alpha characters will be used only when issuing MANUAL awards as a result of power outage, PD2 outage, etc. A manual register will be maintained for these awards:

M - Purchase Orders - manual (use W only when numbering of M is exhausted).

Q - Request for Quotations - manual.

e. Contractual documents will be created and completed IAW procedures in the user guides provided by the BOB-CAT functional system administrator in conjunction with the PD2 on-line Help and the Army SPS CONOPS.

(1) User Guides for contractual documents:

PR Entry and Workload Assignment.

Solicitations.

Awards and POs.

FSS Delivery Orders.

IDIQ DO/TO.

NIH Awards.

UNICOR/NIB/NISH AWDS.

Credit Card-Payment Actions.

Creating DD350s.

Correcting DD350s.

Standalone DD350s.

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(2) Website to access Army SPS CONOPS:  
<http://armysps.sdcl.lee.army.mil/>

3. DESKTOP ORGANIZATION. Organization of the  
"electronic desktop" is essential in maintaining  
efficiency.

a. Cabinets - Creation of Individual cabinets will  
be kept to a minimum.

b. Cabinets should be managed as follows:  
Individual/Personal Cabinet(s) (yellow) - To minimize  
desktop clutter, individual cabinets should not exceed 2.

c. The system (PD2) automatically assigns the  
initial Personal "working" cabinet to each user.

d. Individual cabinets will not be created merely to  
segregate workload; folders will be used within the  
cabinets to segregate the workload.

e. Items must be moved from the User's Inbox into  
the Individual's cabinet prior to working the action.

f. Released and distributed actions will be moved  
out of the individual's personal cabinet into the  
appropriate Team Cabinet. Contract files will not be  
kept on the user's desktop as this creates clutter and  
causes problems in locating and accessing the files.

g. Team Cabinets (gray) - Team Cabinets are used  
much like an office filing system. Upon release of an  
action, the action is moved from the individual's  
personal cabinet into the appropriate Team Cabinet.

h. The following Team Cabinets have been established  
and appear on the appropriate user desktop:

<u>DA08</u>	<u>DA09</u>	<u>DA10</u>
SAP ACTIVE	SAP ACTIVE	SAP ACTIVE
SAP CLOSED	SAP CLOSED	SAP CLOSED
LARGE ACTIVE	LARGE ACTIVE	LARGE ACTIVE
LARGE CLOSED	LARGE CLOSED	LARGE CLOSED

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DA13

SAP ACTIVE  
SAP CLOSED  
LARGE ACTIVE  
LARGE CLOSED

DA16

SAP ACTIVE  
SAP CLOSED  
LARGE ACTIVE  
LARGE CLOSED

DA19

SAP ACTIVE  
SAP CLOSED  
LARGE ACTIVE  
LARGE CLOSED

i. The Team Cabinet, titled DOD IDIQ, is used to file External IDIQ contracts issued by other DOD agencies (DLA, Air Force, Navy, etc.) and may be used by all Teams.

j. Segregate actions by type and FY within the Team Cabinets using folders. Site Functional System Administrators (FSA) will add/maintain folders as the need arises.

4. FOLDERS. Use of folders is the primary method of organizing/segregating work within each award/contract folder, much the same way tabs are used in a hard copy contract folder. There are two types of folders in PD2, Workload Assignment Folders and User Created Folders.

a. Workload Assignment Folders (blue) - The Workload Assignment Folder is created by the system when an action is assigned to a user through Workload Management and must remain with the action throughout the procurement process, eventually becoming the contract folder. Reference the user guide titled Workload Assignment Folders.

(1) Folder remains blue until assigned action is awarded and released.

(2) Workload Assignment Folders will be labeled with the PR number and brief description.

(3) PRs are not to be removed from the Workload Assignment Folder; if the master PR and the awards are not in the folder upon release of the award, the workload assignment will not complete and the assignment will remain open on the buyer workload and continue to increase CALT.

b. Upon issuance of a solicitation, the folder will be renamed with the solicitation number and a brief

description.

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c. Upon award, the folder will be renamed with the award number and abbreviated contractor name.

d. All documents pertaining to the action will be filed within this folder, and segregated, if necessary, with User Created Folders.

e. User Created Folders (yellow) - The user creates this folder and the folder is best used to segregate actions both on the desktop and within a contract folder.

(1) For SAP Actions, user should create PreAward and PostAward Subfolders to segregate the documents within the blue Workload Assignment Folder.

(2) For large contracts, user will create subfolders to segregate the documents within the blue Workload Assignment Folder; e.g., a subfolder for each of the following:

Pre-Award.

Evaluation Documents (subfolder of PreAward subfolder).

Post-Award.

Modifications (subfolder of PostAward subfolder).

Delivery Orders (subfolder of PostAward subfolder).

Reference user guide titled Folders and Subfolders.

f. Upon release of the award, the blue folder turns yellow, only if the master PR and the award are both in the blue folder.

g. Upon release, award/contract folders will be filed/moved to the appropriate Team Cabinet, e.g., SAP ACTIVE.

5. Our point of contact is Ms. Sandra Gaddy, U.S. Army Medical Command Health Care Acquisition Activity, DSN 471-4095 or Commercial (210) 221-4095.

LINDA H. SMITH  
Chief of Staff

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